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September 20, 2004

Dear CMA Director,

RE: Regional Rideshare Program (RRP) – Delegation of Employer Outreach and Services

As discussed at the July 13th Partnership Board meeting, MTC is prepared to implement a recommendation from the Rideshare Program Performance Audit to delegate responsibilities and funding for employer outreach to those counties that are in a position to deliver these services directly. For those counties that do not accept delegation of employer outreach and funding, the rideshare program contractor will continue to provide these services under a new contract starting in FY 05-06. My intent in writing to you now is to describe our proposed employer outreach strategy and timeline and to confirm your county's interest in accepting delegation for employer outreach for the six-year period.

Background

MTC intends to issue a request for proposals (RFP) this fall for rideshare services starting in FY05-06 through FY10-11. With the help of our Procurement Working Group, a subset of the Rideshare Technical Advisory Committee (TAC), we have finalized an "industry review" draft of the RFP. A copy of the Draft RFP for Industry Review is enclosed for your review and comment (hard copy only.)

For the purposes of this industry review draft, we have made assumptions about the counties that will/will not accept delegation. At this point, we expect Contra Costa Transportation Authority to accept delegation for Contra Costa county and designate Contra Costa Commute Alternatives Network as the implementing organization; the San Mateo City/County Association of Governments to accept delegation and designate the Peninsula Traffic Congestion Relief Alliance; and finally, the Napa County Transportation Planning Agency and Solano Transportation Authority will accept delegation and designate Solano Napa Commuter Information (SNCI). While we do not expect to resolve all the details associated with delegation by the time the final RFP is issued, we need formal confirmation from counties who will accept delegation in order to determine the program's scope of services and the budget.

Delegation Strategy

Any of the nine Bay Area County Congestion Management Agencies (CMAs) may accept delegation of the employer outreach function within its county for the period of FY05-06 to FY10-11. The next opportunity for a county to choose whether to accept delegation will be in FY 09-10 for the next contract period. The CMA shall identify the county organization responsible for implementing the employer outreach

responsibilities in its county. The implementing organization shall act on the behalf of, incorporate the identity of, and support the mission and goals of, the Regional Rideshare Program when fulfilling the employer outreach function, regardless of additional funding sources the county might use to support this function. Attachment A shows the draft scope of services as well as the performance measurements to be tracked by the counties accepting delegation. MTC has discussed this preliminary scope with the rideshare TAC at its September 16th meeting.

Funding

MTC will allocate a \$70,000 budget annually for FY05-06 to FY10-11 to each county agreeing to accept delegation. There is an exception to this amount for Solano and Napa counties, who together will receive additional funding (\$100,000 each year) to provide services beyond employer outreach, including extended vanpool services, carpool ridematching services and telephone services. Solano Napa Commuter Information (SNCI) has provided these services on behalf of the regional program for many years. Their expected total amount of funding – \$240,000 – is significantly less than what MTC has provided SNCI in the past. Please see Attachment B for more information on their additional work. We expect that there might be further questions from other counties regarding the additional tasks and funding being offered to SNCI and are interested in feedback.

Air District Funding

Because many county programs use County Program Manager TFCA funds for rideshare-type services, MTC will meet with the Air District in October to ensure that the use of the CMAQ funds by counties with delegated responsibilities will not impact your ability to deliver existing services using TFCA funds. Our current thinking is that counties may continue to take trip reduction credit for employer outreach activities in their reporting to the Air District, since the rideshare program does not take such credit. MTC, however, shall continue to take credit for any ridematching activity that results from employer outreach activities, including regional campaigns.

MTC would also like to discuss with the Air District our interest in developing an aggregate report for all rideshare achievements in the region—regardless of TFCA County Program Manager or regional funding source contributions. We will be seeking the assistance and support of the counties as we sort through this.

Next Steps

1. CMA Association Meeting. I will be available to discuss this letter at the CMA Association meeting on September 24th.
2. Delegation Decision: We would like confirmation by **September 27, 2004** from all counties whether they will accept the delegation for the six-year period of the new rideshare contract (FY 05-06 to FY 10-11) and to what organization they would like to designate the responsibility. Please confirm by e-mailing Susan Heinrich-Beaty at sheinrich@mtc.ca.gov.
3. Air District Meeting. We expect to schedule a meeting with the Air District for early October. We plan to discuss continued strategies for a more regional approach to reporting, funding and project delivery. We will coordinate the meeting's agenda through the rideshare TAC.

4. Industry Review RFP. This draft RFP is attached (hard copy only.) We encourage your organization to provide us feedback. Closing date for comments will be September 27th.
5. Execution of Funding Agreement: MTC intends to finalize the funding agreements with the CMAs by December 2004. We are currently working to determine the most streamlined option to execute these agreements. Funding agreements will be developed to reflect county-specific issues, as necessary.

MTC greatly values the input from your agencies and county TDM representatives. We thank you in advance for your continued assistance in helping create a Regional Rideshare Program that is well coordinated with the county TDM services. Please contact me at mcrotty@mtc.ca.gov or at 510-817-3280 if you have questions.

Sincerely,

Melanie Crotty
Manager, Traveler Coordination & Information

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Regional Rideshare Program Technical Advisory Committee (Industry Review RFP distributed to TAC 9/13/04)

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ATTACHMENT A
MTC/CMA Employer Outreach and Services Agreement
Draft Scope of Services
FY 05-06 to FY 10-11

The county and/or its designated implementing organization shall:

1. Act on the behalf of, incorporate the identity of, and support the mission and goals of, the Regional Rideshare Program when fulfilling the employer outreach and services responsibilities/tasks.
2. Ensure that work and funding arrangements between MTC and the county are resolved.
3. Introduce transportation demand management (TDM) concepts and provide technical assistance to employers that do not have TDM programs or are not aware of regional rideshare program services.
4. Encourage employers that do not have TDM programs to implement programs at their worksites, including use of the RRP ridematching system (RMS).
5. Work with employers that already have TDM programs to encourage them to improve the quality and substance of the products and services they offer.
6. Support coordination of multi-site employers, especially those that are located in multiple counties.
7. Provide ongoing communications to employers with TDM programs (or those without that are still interested) in hearing about regional rideshare news and offerings.
8. Maintain an employer outreach database.
9. Make the employer outreach database available to MTC and TDM partners for communications and mailings, as requested by MTC.
10. Coordinate with MTC and the rideshare Contractor on distribution of employer outreach/regional campaign materials.
11. Assist in implementation of any regional events or campaigns involving work with employers.
12. Support and facilitate the entry of employee names into the ridematching database.
13. Ensure that all vanpools the county has helped form (or knows about) are entered into the ridematching database.
14. Use the regional rideshare program's identity and phone number/website (511/511.org) in any employer communication methods. Work with other counties and MTC to develop a uniform way to integrate county program identities with 511.
15. Participate in rideshare TAC meetings and any relevant TAC Working Group meetings. These meetings shall serve as the forum for coordination with counties accepting delegation, the rideshare Contractor, and MTC on outreach services activities, including:

- a. Rideshare Contractor development of any materials that will be used for employer outreach;
 - b. Rideshare Contractor development of any regional events or campaigns involving work with employers; and
 - c. Performance reporting on employer outreach activities.
16. Monitor and report program performance based on measurements and targets set by MTC. MTC, with input from the rideshare TAC, will establish targets for each of the measurements as a whole and for each county. The counties shall report on these performance-based measurements to MTC (through the rideshare contractor) on a monthly basis for each of the six years of the agreement period. MTC will monitor the employer outreach efforts of the counties accepting delegation by using the same measurements we will use to monitor the efforts of the rideshare contractor during FY 05-06 to FY 10-11. The measurements are:
 - Number of new employers contacted
 - Number of active employers (“Active employers” are employers who receive personal consultation within the month. Personal consultation may be in-person, over the phone, or via e-mail. It requires contact beyond a general employer mailing or communication effort.)
 - Number of maintenance employers (“Maintenance employers” are employers who received active assistance in the past or those that are interested in hearing about regional rideshare program news and offerings, even though they have never received active assistance. A maintenance employer receives general employer mailings or e-mail updates on a periodic basis.)
 - Number and types of employer “sales”
 - Other data to be jointly agreed upon by MTC and the TAC

The rideshare contractor will be responsible for compiling data for presentation to MTC. (MTC will work with the rideshare TAC to identify any statistics beyond the four measurements outlined earlier that the counties may be asked to report.) The counties will not be asked to collect or compile any new statistics beyond what they already collect for their own existing reporting needs.

ATTACHMENT B
Draft
Additional Responsibilities/Tasks
Solano Napa Commuter Information

In addition to the scope of services included in Attachment A, SNCI will receive additional funding so it can continue to provide extended vanpool services, carpool ridematching services and telephone services in the two counties. These services have cost approximately \$100,000 per year in the past several years, and include:

1. Form new vanpools (with origins and destinations in Solano and Napa counties) through employers and general public services.
2. Maintain the records for vanpools within its service area using the RRP Ridematching System. Coordinate with RRP Contractor and other counties, as applicable, on sharing relevant information.
3. Help existing vanpools stay in operation.
4. Process Motor Vehicle Records, including providing Sworn Statement Cards.
5. Provide clinic referrals for required driver medical exams.
6. Provide partial or full reimbursement for DMV-required medical exams for vanpool drivers..
7. Provide DMV paperwork for drivers to take to doctors and green cards that doctors need to sign and vanpool drivers need to carry.
8. Provide free magnetic signs for vanpool vehicles, as required by law.
9. Process vanpool parking permits for the cities of San Francisco and Oakland.
10. Process bridge scrip qualification forms and distributing bridge scrip per Caltrans guidelines.
11. Provide support, as necessary, to drivers, regarding rules and regulations (and interpretation thereof) pertaining to vanpools and carpools. This work involves coordinating with Caltrans and the CHP, as necessary.
12. Operate the ridematching telephone service function of the 511 traveler information system for Napa and Solano counties (i.e., respond to rideshare, bicycling and Sacramento airport calls via 511). Answer callers' questions about various transportation modes using the information available on 511.org or through SNCI.
13. Conduct follow-up calls to database registrants and implement database quality control procedures.
14. Obtain and maintain necessary telecommunications equipment to provide ridematching services, including providing "point to telephone numbers" to which the 511 system will connect for each of the rideshare telephone service functions.
15. Coordinate with MTC's 511/511.org staff on changes to 511 call flows and scripts and 511.org Rideshare modifications.
16. Maintain reporting capabilities that facilitate monitoring of the 511 service, including tracking customer usage by call type.
17. Enter data into the online ridematching system (RMS).
18. Obtain necessary equipment and licenses to operate the RMS.
19. Implement all aspects of any regional campaign in its service area, not just through employers. Customize and produce campaign marketing materials.
20. Provide performance monitoring statistics to MTC (via the RRP Contractor).

21. Market 511.org rideshare services in Solano and Napa counties through home-end marketing and other non-employer based methods including staffing non-employer events.
22. Provide TDM assistance to local organizations and regional partners as needed.